



Decision Making Matrix

HIGH

<p style="text-align: center;">CAUTION (comfortable but lacks understanding)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Be patient and don't rush them <input type="checkbox"/> Clarify at every point – ask "is there anything you'd like me to explain" <input type="checkbox"/> Ask the customer to explain their understanding of the agreement <input type="checkbox"/> Offer alternatives to buying by phone e.g. transact by post or email <input type="checkbox"/> Ask if there is a better time to call <input type="checkbox"/> Ask whether there is anyone they need to talk to before making a decision 	<p style="text-align: center;">PROCEED (understands and comfortable)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Ask yourself honestly whether the agreement is a real yes or just a submission <input type="checkbox"/> Proceed and process the agreed transaction
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Comfort: seems happy, lucid, talkative</p> <p style="text-align: center;">STOP (low understanding and low comfort)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Speak clearly and enunciate <input type="checkbox"/> Be patient and don't rush them <input type="checkbox"/> Ask if there is anything that the customer would like explained again <input type="checkbox"/> Offer the customer time to make a decision <input type="checkbox"/> Offer alternatives to buying by phone e.g. transact by post or email <input type="checkbox"/> Ask if there is a better time to call <input type="checkbox"/> Ask if there is anyone else they need to talk to before making the decision <input type="checkbox"/> Suggest the customer talks it through with someone and offer a call back – where appropriate suggest a carer or guardian could be present on the call <input type="checkbox"/> Guide the call to keep it 'on topic' <input type="checkbox"/> Don't assume you know what the customer needs – allow them time to explain fully 	<p style="text-align: center;">REVIEW (understands but not comfortable)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Be patient and don't rush them <input type="checkbox"/> Ask if there is anything that the customer would like explained again <input type="checkbox"/> Offer the customer time to make a decision <input type="checkbox"/> Offer alternatives to buying by phone e.g. transact by post or email <input type="checkbox"/> Ask if there is a better time to call <input type="checkbox"/> Ask if there is anyone else they need to talk to before making the decision <input type="checkbox"/> Suggest the customer talks it through with someone and offer a call back – where appropriate suggest a carer or guardian could be present on the call <input type="checkbox"/> Don't assume you know what the customer needs – allow them time to explain fully

LOW

Understanding: able to - understand the discussion, - weigh up information, - retain information, to communicate a decision

HIGH